

eVA Interface and Integration Design Team – Import/Export Group

Meeting Minutes
September 4, 2003

Opening:

A meeting of the eVA import/export interface workgroup was called to order at 10:00 AM on 9/4/2003 in Richmond.

Present:

Debbie Adams, DMV (phone)	Joy Lazarus, DMHMRSAS (phone)
Jan Bond, DGS/DPS	Tim Moore, VITA
Richard Brough, DSS	Linda Orr, WM (phone)
Martha Freeland, DMV (phone)	Jim Roberts, DMHMRSAS (phone)
Kavansa Gardner, Richmond Public School	Wiley Rowsey, DGS/DPS
Pauline Garther, Richmond Public School	Kim Rudisill, DEQ
Julie Hamilton, DMHMRSAS - ESH (phone)	Samy Sethuraman, VITA
Maria Hatcher, DGS	Dana Smith, VITA
Cheryl Kimball, DOLI/DCR (phone)	John Tackley, VITA
Marion Lancaster, DGS	Judy Wills, VATECH (phone)
Jamie Lassiter, VCU (phone)	Ellie Withers, UVA (phone)

A. Approval of Agenda

The informal agenda:

- 1 – Introduction of Presenters
- 2 – Vendor Workshop

B. Approval of Minutes

Previous meeting minutes not reviewed.

C. Issues

Open Issues

Closed Issues

D. New Business

1. Marion Lancaster opened the meeting by giving a brief overview of how interface orders are processed and delivered to the vendor electronically through the eMail. Basically, there are two ways vendor locations are identified by an agency through the interface import files. The agency has an option to provide the combination of Tax ID + Zip, or the Duns and Bradstreet number (DUNS) that is provided by the

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vendor when it registers in eVA. Agencies are either downloading the vendor location information from the eVA website via the vendor prod 030 report or through the Java Client. Agencies then import the vendor location information into their ERP system and make it available to their interface orders. Marion mentioned that some agencies are handling this vendor maintenance better than others and therefore scheduled this special vendor workshop in order for agencies to share how they are handling the vendor maintenance. Richard Brough from DSS and Kim Rudisill from DEQ volunteered to share how their agency chose to implement the eVA vendor file in their ERP system and how they are handling maintenance of the eVA interface vendors. The rest of the vendor workshop was basically the presentation given by Richard Brough and Kim Rudisill.

2. **Richard Brough Presentation:**
Richard provided a flowchart document (eVA – ERP Vendor Ordering Locations) describing the approach and the process steps and description of each process to load the eVA vendor locations from the prod 030 report into their ERP system and how matches are done based on TAX ID + Zip. Below is a summary of the process steps taken from the document presented by Richard.

Process Description:

- 1) In the eVA Technical Page, save prod030 report "Vendor Ordering Locations" file to PC.
- 2) Use SQL Loader to import file to Oracle database.
- 3) Run Oracle Report to select matching rows or exception rows and report.
- 4) Users maintain Oracle Vendor Site (locations) table to match to eVA Registered Ordering Location.
- 5) DUNS is looked up automatically by the eVA Interface, but DUNS can be entered at the vendor site screen if resolving duplicate TIN/zip(5) combinations.
- 6) Preferred Ordering Method is shown in the Vendor Quick Reference report. This report uses the prod030 data loaded into the ERP table. Better solution is to modify the PO entry screen to display, but this option is not working in 'standard' Oracle Financials yet. On list of things to do.
- 7) Buyer selects Preferred Ordering Method at entry of each PO. This is stored with the PO header and used by the eVA Interface.
- 8) Default DUNS lookup is done by eVA interface with override from Vendor Site table if entered. Preferred Ordering Method is brought in from PO header.

Attached with the minutes is the document presented and discussed by Richard. If you have any questions concerning the document or his presentation, please contact him directly via email rgb2@email1.dss.state.va.us.

Kim Rudisill Presentation:

Kim provided a Word document describing the approach taken by his agency on implementation and maintenance of the eVA vendor locations. Below is an excerpt taken from the first page of the Word document:

"DEQ does not perform any individual vendor file maintenance in the Oracle financials application. We have taken the approach that the eVA registered vendor table is the most timely and accurate information we can use, so why not simply use it.

Therefore, we periodically log into eVA and run the 030 download report, which is then transferred onto our Oracle server and converted to an Oracle table format in the Oracle production instance. This table is then accessed by our custom written Approve for eVA program and suppliers located based on Federal ID number and zip codes. This is then

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used to determine if a vendor is registered, if an ordering location is registered, what other ordering locations are registered and the preferred ordering methods of each registered location. This will be demonstrated further down in this presentation.

There are only two new fields of data required on an Oracle purchase order. The purchase order category and NIGP code. Actually the NIGP code is not really new, but DEQ did not use that field of data prior to eVA.

DEQ's overall goal was to minimize the impact of eVA on its user community. Supplier maintenance is totally unchanged. And the additional two data fields on a purchase order take essentially zero time to enter. We have essentially 100% accurate data with essentially zero increased overhead to execute eVA. Who could ask for anything more?"

Attached with the minutes is the document presented and discussed by Kim. If you have any questions concerning the document or his presentation, please contact him directly via email kmrudisill@deq.state.va.us.

Vendor 030 Report Versions:

There was a brief discussion of the versions of the vendor locations report available on the eVA website and via the Java Client. The three vendor locations report available to the agency to be downloaded are:

- a. Download from the Java Client – This file is generated at midnight each day. Any vendors that registered in eVA prior to midnight should appear in this download. The data is generated from the same vendor database that is used to validate import interface vendors.
- b. eVA_PROD_030_v3.csvreport (with running man icon, no description) on the 'Technical' eVA report page. This report is generated from the vendor registration data as of 5:00 a.m. each day. Any vendor registered prior to 5:00 a.m. should appear in this report. The data on report a and b should be identical.
- c. eVA_PROD_030_v3.rpt , description 'Advantage Vendor Location and Contact' on the 'Technical' eVA report page. This report contains vendor registration up to the current date/time, therefore the data can vary throughout the day. It contains real time vendor registration data.

If there are any data discrepancies with the vendor location data, please let Marion or Maria know. For general questions about vendor registration or how to register vendors in eVA, please contact the DPS Supplier Adoption Team by email eVA-Customer-Care@dgs.state.va.us.

3. Production Status
 - DGS –
 - Status not taken.
 - VDOT –
 - Status not taken.
 - DMAS –
 - Status not taken.
 - DSS –
 - Status not taken.
 - DMME –
 - Status not taken.
 - ABC –
 - Status not taken.
 - DOLI –
 - Status not taken.
 - DEQ –
 - Status not taken.
 - DCR –

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- Status not taken.
 - VATECH –
 - Status not taken.
 - UVA -
 - Status not taken.
 - VCU -
 - Status not taken.
 - DMHMRSAS–
 - Status not taken.
 - JMU –
 - Status not taken.
 - ODU –
 - Status not taken.
 - VCE –
 - Status not taken.
4. Agency General Status
- DMV –
 - Status not taken.
5. Policy Questions
- No new questions.

The next **weekly** interface meeting will be held on Thursday, September 11, 2003 at DGS in the ISS 9th floor conference room starting at 10:00 a.m. Please be prepared to give your agency's status on the import interface effort and problems if any.

Open Action Items

1. Find out if and how agencies will have access to the DGS Holding database. (Marion Lancaster)

05/29/2003 DGS is not planning on giving agencies access to the DGS Holding database. DGS is actively working with AMS on the design to load "holding tank" data into the eVA data warehouse. Agencies will then be able to access that information through the normal data warehouse reporting process.

Closed Action Items

Prepared by Maria Hatcher

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